

The Report

In the beginning, the dataset contained raw information that offered little value to decision-makers. To turn it into something useful, I began by asking key questions that could reveal insights to support performance evaluation and improvement.

Before analysis, I took the following preparatory steps:

1. Understood the structure and content of the data
2. Cleaned the data using Power Query
3. Added calculated columns such as COGS (Cost of Goods Sold)
4. Modeled the data and created measures to support analysis

Then, I explored the following questions:

◆ **To Enhance Customer Loyalty:**

- What is the most frequently used shipping mode?
- Who are our top 5 customers by sales and order frequency?

◆ **To Monitor Strengths and Weaknesses:**

- Which customer segment generates the most sales?
- Which city and state have the highest sales?

◆ **Performance Measurement:**

- What are the top-performing product categories in terms of sales and profit?
- What is the most profitable product?
- What is the least profitable product?

◆ **Customer Experience:**

- On average, how long does it take for orders to be delivered, based on shipping mode?

After answering these questions using pivot tables and visuals, I created a clear and informative dashboard to communicate the insights.

Finally, I calculated KPI metrics to assess how well sales representatives performed against their targets.

The answers for questions by pivot tables and charts from the dashboard

About distribution:

Which city has the most sales value?

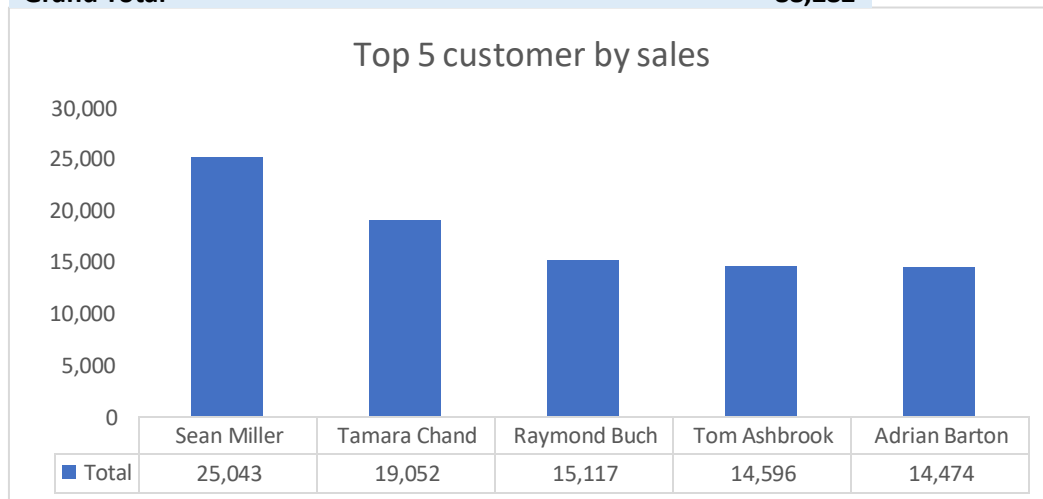
Row Labels	Sum of Sales
New York City	256,368
Grand Total	256,368

Which state generates the most sales value?

Row Labels	Sum of Sales
California	457,688
Grand Total	457,688

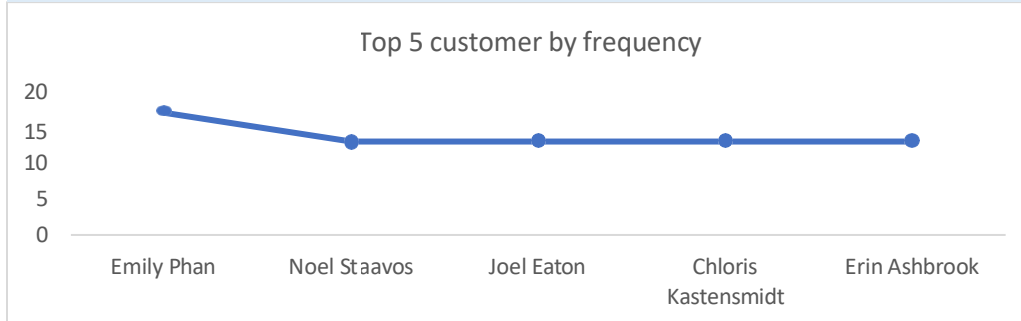
Who are our top 5 customers in terms of sales?

Row Labels	Sum of Sales
Sean Miller	25,043
Tamara Chand	19,052
Raymond Buch	15,117
Tom Ashbrook	14,596
Adrian Barton	14,474
Grand Total	88,282



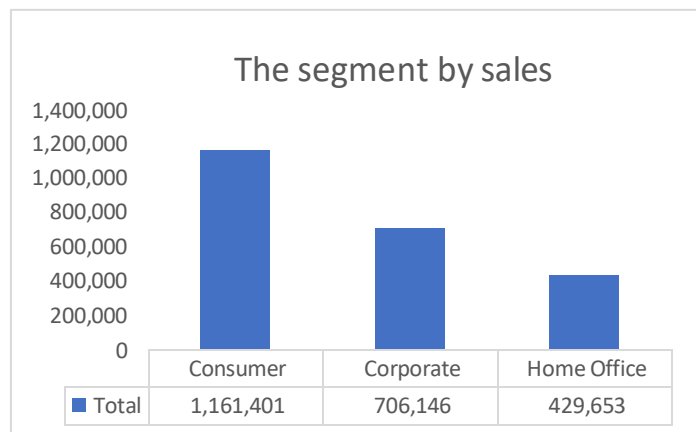
Who are our top 5 customers in terms of order frequency?

Row Labels	Distinct Count of Order ID
Emily Phan	17
Noel Staavos	13
Joel Eaton	13
Chloris Kastensmidt	13
Erin Ashbrook	13
Grand Total	69



Which segment of clients generates the most sales?

Row Labels	Sum of Sales
Consumer	1,161,401
Corporate	706,146
Home Office	429,653
Grand Total	2,297,201



Top 5 States	Sales
California	457,688
New York	310,876
Pennsylvania	116,512
Texas	170,188
Washington	138,641



About Sales:

What is the most profitable product that we sell?

Row Labels	Sum of Profit
Canon imageCLASS 2200 Advanced Copier	25,200
Grand Total	25,200

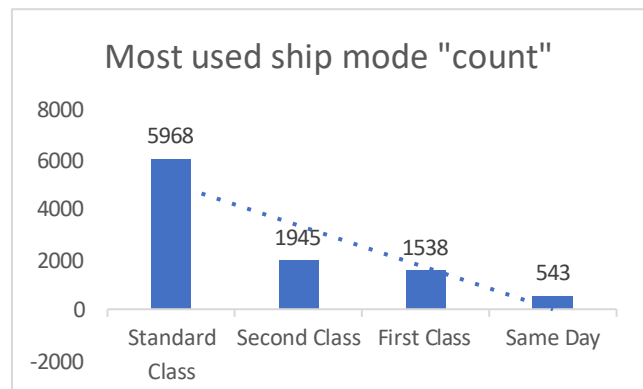
What is the lowest profitable product that we sell?

Row Labels	Sum of Profit
Cubify CubeX 3D Printer Double Head Print	-8,880
Grand Total	-8,880

What is the most used ship mode by our customer?

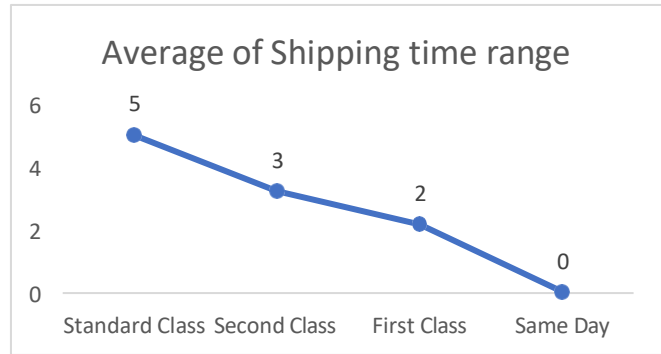
Row Labels	Count of Ship Mode
Standard Class	5968
Second Class	1945
First Class	1538
Same Day	543
Grand Total	9994

Standard Class is the most ship mode



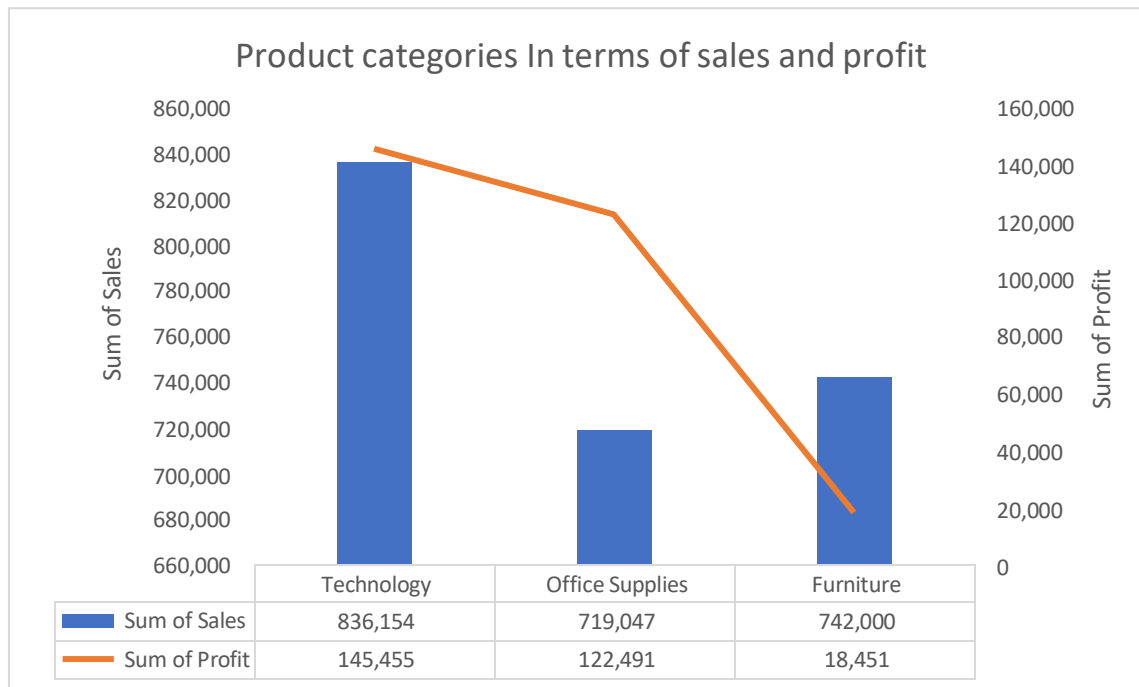
On Average how long does it take the orders to reach our clients?

Row Labels	Average of Shipping time range
Standard Class	5
Second Class	3
First Class	2
Same Day	0
Grand Total	4



What are the top performing product categories In terms of sales and profit?

Row Labels	Sum of Sales	Sum of Profit
Technology	836,154	145,455
Office Supplies	719,047	122,491
Furniture	742,000	18,451
Grand Total	2,297,201	286,397



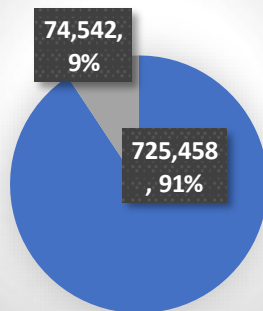
About KPIS:

Row Labels	Sum of Sales
Anna Andreadi	725,458
Cassandra Brandow	391,722
Chuck Magee	678,781
Kelly Williams	501,240
Grand Total	2,297,201

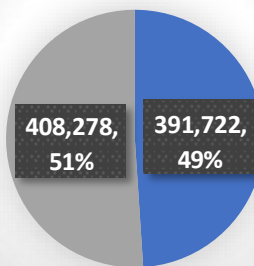
The target on the past period
800,000 \$

Name	Achieve	Perc.	mis	Perc.
Anna Andreadi	725,458	91%	74,542	9%
Cassandra Brandow	391,722	49%	408,278	51%
Chuck Magee	678,781	85%	121,219	15%
Kelly Williams	501,240	63%	298,760	37%

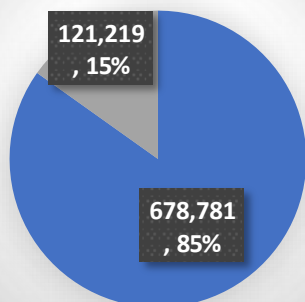
Anna Andreadi



Cassandra Brandow



Chuck Magee



Kelly Williams

